

Definitions

Introduction

The following table lists PDM related terms with their definitions.

Definitions

Term	Definition
ADA Checklist	The Americans with Disabilities Act (ADA) prohibits state and local governments from discriminating on the basis of disability in contracting for commodities and services.
Affirmative Action Plan	An affirmative action plan identifies the bidder's commitment to non-discrimination in employment and to procure commodities, services and supplies from certified minority and women-owned business enterprises, businesses owned by individuals with disabilities and businesses owned and controlled by socially or economically disadvantaged individuals. The Affirmative Action requirement is usually addressed through procedures established and required by the various secretariats.
Agency Staff for Purchase of Service (POS)	Executive Office of Health and Human Services (EOHHS) agencies maintain individual departments, divisions or bureaus that are responsible for managing purchase of service providers and, in some cases, the programs that the providers deliver to consumers.
Commonwealth Information Warehouse (CIW) Database	The repository of NewMMARS (the state accounting system) financial and accounting information stored in a MS SQL Server database that is managed by the Information Technology Division (ITD).

Term	Definition
CIW Reporting	The PDM application requires data from the Commonwealth Information Warehouse (CIW). The Provider Data Management technical team will implement a series of views off the tables from CIW to handle some of the business rules around reporting and data presentation.
Enterprise Reporting Service	The Health and Human Services (HHS) standard reporting tool, which enables Agency Staff to perform a range of reporting functions from running simple reports to complicated ad hoc queries. Agency staff will have access to the Enterprise Service through the web. It will not be necessary to download or install any new software.
Commonwealth Information Warehouse (CIW)	The Information Technology Division (ITD) under the Executive Office for Administration and Finance maintains a Commonwealth Information Warehouse that extracts data from NewMMARS (the state accounting system) and loads the data into a warehouse that is accessible by Microsoft Access clients. It is also a data feed to PDM.
Commonwealth Terms and Conditions	Documents, jointly issued by Executive Office of Administration and Finance (ANF), Operational Services Division (OSD) and Office of the State Comptroller (CTR), that must be executed by all Contractors that enter into Contracts with the State.
Consumer	A consumer is defined as a person who uses or wishes to use health and human services provided by any one of the EHS agencies.

Term	Definition
Contact Management	There are two types of contacts in the PDM application, agency contacts, and POS Provider contacts. Also included in the contact management component of PDM is the tracking of addresses for the POS Providers as they relate to the Provider's various sites in the commonwealth.
Contract Report by Agency and POS Provider	Contract report that prompts the user to select one or more Health and Human Service agencies and then view all of the vendors that are contracted to provider services. The report contains activity/program detail information as well as financial measures. The data is sourced from CIW using the M_PR_ENCUMBRANCES table and updated weekly.
Contract Report by Agency and Program	Contract report that prompts the user to select one or more Health and Human Service agencies and then view all of the program and activities and see which vendors are contracted by programs. The data for the report is sourced from the CIW table M_PR_ENCUMBRANCES.
Contract Standard Reports	The contract reporting standard reports are based on data sourced from a CIW table called M_PR_ENCUMBRANCES (referred to in this document as the encumbrances table). The encumbrances table contains information across all Commonwealth agencies and measures not just encumbrances, but the dollars left in a contract as well as the total contract amount.
CORI Policy	Criminal Offender Record Information Policy
Disaster Plans	An uploadable file to PDM.
Disciplinary Policy	An uploadable file to PDM.

Term	Definition
EOHHS Agency	EOHHS Agency maintains individual departments, divisions, or bureaus that are responsible for managing purchase of service providers and, in some cases, the programs that the providers deliver to consumers. EOHHS agencies are recognized by a three letter code that is used in the state accounting system.
EOHHS Data Warehouse	Maintained by EOHHS, enterprise-wide data warehouse to serve as the single repository for centralized agency health and human service information.
EOHHS PDM Help Desk	This unit will answer inquiries, troubleshoot problems, and provide navigational advice/ instructions to new and current users.
ETL Service	The data warehouse uses Informatica as its Extract, Transform and Load (ETL) tool. The PDM application requires the ETL warehouse service to populate CIW and UFR tables on a weekly basis. The service in the EHS Data warehouse used to extract data from external source systems and load the data into the PDM database.
Financial Assessment Measures	A common set of measures to be used to help determine the financial stability of a provider. Refer to the <i>Appendix</i> section in this chapter.
Financial Assessment Measures – POS Provider Comparison Report	This report provides the user with the opportunity to compare financial assessment measures for selected Purchase of Service (POS) Providers.

Term	Definition
HHS Provider Qualification Unit	A member of the EOHHS Provider Qualification staff responsible for maintaining POS Provider qualification data on the PDM system, updating a Provider's qualification status and entering in comments about a provider.
Human Rights Policy	An uploadable file to PDM.
Mission Statement	A mission statement should accurately explain why the organization exists and what it hopes to achieve in the future. It articulates the organization's essential nature, its values and its work.
NewMMARS	The New Massachusetts Management Accounting and Reporting System (NewMMARS) is a centralized, financial database system specifically designed to support the financial functions performed by the Commonwealth.
Office of the State Comptroller	The Office of the State Comptroller (CTR) is an independent agency within the Executive Branch. CTR's mission is to work with Commonwealth fiscal officers in 157 Departments to ensure the integrity, accountability and efficiency of the Commonwealth's fiscal operations, communicate accurate and timely financial information to decision makers within the Executive, Legislative and Judicial branches, the financial community as well as the general public, and provide leadership and professional guidance in areas of fiscal policy within the Commonwealth and nationally.

Term	Definition
Operational Services Division (OSD)	The Operational Services Division (OSD) facilitates and audits the acquisition of commodities, professional, general, human and social services.
OSD Uniform Financial Report (UFR) Database	The repository of UFR information stored in a MS SQL Server database managed by Information Technology Division (ITD) at the Operations Services Division (OSD).
PDM Activity/Program Contract Summary	Contract Report that provides a summary of dollars spent by activity/program for a selected Health and Human Service agency. The data is sourced from the Commonwealth Information Warehouse (CIW) M_PR_ENCUMBRANCES table and is updated weekly.
Provider Data Management (PDM) Business Service	The Provider Data Management application is a web-based, secretariat-wide service within the Virtual Gateway that serves as a central repository of common information about EOHHS Purchase of Service (POS) Providers. It presents a consolidated view of a provider's organizational structure, financial health, state contract activity, and eventually, certain performance measures and licensing information. This service will reside under the provider and government constituent tabs within the Virtual Gateway, allowing providers to access and maintain their own, individual information and EOHHS agencies to access all POS providers' information across the secretariat.
PDM Business Functions Page	The business functions page is a data driven and security driven page that only displays the services available to the specific user class.

Term	Definition
PDM Database	The repository for POS Provider information collected online and through extract, transform, and load (ETL) procedures executed against other database systems.
PDM Detail Pages	The PDM Detail pages contain the lowest level of detail information about a specific subject area of data for a provider. The detail pages will maintain a common header with the provider's name and the name of the detail page. When the user is a provider, the provider will see links to update pages that will enable them to update the data.
PDM Login Page	This describes the login process, initiated by the provider, the agency, or the POS Provider.
PDM Search Page	The PDM search page is only available to agency staff and the Provider Qualification Unit. This page enables the user to search for information about a specific provider or to click on a link to the Enterprise business service for comparing information about multiple providers. The search page gives the user three options to search, either by Provider first initial, by FEIN or by provider name. The results of the search are rendered on the page. The search functionality allows agency staff to access the corporate information page for a POS Provider.
PDM Services Provided Page	This details the view process for services provided by the POS Provider for agency staff.

Term	Definition
PDM Summary Page	The PDM summary page is designed to render information about the provider in a summary format that enables a quick view about the provider with an ability to drill into detail information by clicking on the Go to Details... links.
PDM Update Required Documents and	PDM allows the POS Provider to upload files for required documents and forms.
PDM View Agency Business Services Page	This details the view process for the provider's business services.
PDM View Contracts Detail Page	This details the view process for Provider Contracts Detail information for agency staff.
PDM View General Information	This details the view process for Provider General information for agency staff.
PDM View POS Provider Contracts Detail	This details the view process for Provider Contracts Detail information.
PDM View POS Provider General Information	This details the view process for Provider General information.
PDM View POS Provider Qualification Page	This details the view process for Provider Qualifications information. Includes the results of financial assessment measures, review status, general comments and related information. Data from the Uniform Financial Report (UFR) will be pulled in order to populate the assessment measure calculations.
Provider Qualification	A process in which a HHS Provider must receive an annual review of their financial status in order to contract with an EOHHS Agency.

Term	Definition
Provider Responses	The POS Providers are prompted to provide some basic information about their business. This section will eventually expand, but for the first release there are a few core questions that the Provider is required to answer. The providers will have the ability to save their answers to the questions before submitting them to the system for agency staff to see.
Provider Services	A non-required component for the POS Provider to enter on the PDM application are descriptions of the services the provider provides to the Commonwealth and services the provider can provide but does not provide to the Commonwealth.
Reporting	The reporting on multiple providers for the PDM application is delivered using the Enterprise Reporting Service. This functionality is only available to agency staff and users accessing the system within the state network, MAGNET. The reporting requirements can be divided into two categories: standard reports and ad hoc reports. The standard reports are rendered using Enterprise ReportNet and the ad hoc reports are delivered using Enterprise PowerPlay Cubes. The first release of the PDM application will contain a small subset of standard reports that reference data for both Contract Encumbrances and UFR Assessment Measures. In the future the application will also include a standard report for comparing demographic information about two providers. The first release will also include two data cubes with information on Contract Encumbrances and Assessment Measures. This section merges both technical and business requirements in order to be as complete in defining the look and behavior of the reports as well as the definition of the data elements.

Term	Definition
Required Forms and Documents	The Required Forms and Documents of the Provider Data Management system, previously known as the Standard Forms Section in the vision document, has changed a number of times based on specific legal constraints. For Release 1.0 of the PDM system the application will allow providers to upload some required documents and forms, but will not support the use of web forms to capture information on the form and store it as separate fields in a database.
Secretary of State's Office (Corporations Division)	Agency, that is responsible for providing links to existing public documents in PDF format. These documents are provider specific and contain a corporation's identity history, Annual Report and other organizational information used to evaluate an organization's background and corporate filings.
Taxonomy	The POS Services Taxonomy groups all programs into three hierarchical levels and supports joint purchasing and standard reporting. The overall EOHHS Taxonomy forms the basis for an enterprise-wide chart of accounts, as well as reporting hierarchies in the new EOHHS data warehouse.
State Auditors Office	The State Auditor's Office (SAO) is responsible for providing links to audit results and recommendations for a provider when applicable. These audit reports are intended to assist program administrators by identifying areas where accounting and administrative controls, program results, and efficiency can be improved.
Terms and Conditions	Documents, jointly issued by ANF, OSD and CTR, that must be executed by all Contractors that enter into Contracts with the State. This field is extracted from NewMMARS – CIW.

Term	Definition
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Terms and Conditions for Health and Human Services	<p>This Commonwealth Terms and Conditions for Health and Human Services form is jointly issued by the Executive Office for Administration and Finance (ANF), the Office of the Comptroller (CTR) and the Operational Services Division/Division of Purchased Services (OSD), for use by Commonwealth of Massachusetts (“State”) Departments and Contractor organizations that contract to provide Health and Human Services to Commonwealth clients. This field is extracted from NewMMARS – CIW.</p>
TIN/FEIN	<p>Tax identification number / federal tax identification number is a nine-digit number (for example, 12-3456789) assigned to sole proprietors, corporations, partnerships, estates, trusts, and other entities for tax filing and reporting purposes.</p>
Uniform Financial Report	<p>The Uniform Financial Statements and Independent Auditor's Report (UFR) is the set of financial statements and schedules required of health and human service organizations who deliver services to the Commonwealth's vulnerable consumers via contracts with state departments.</p>
Update Taxonomy	<p>This function allows POS Providers to update services not currently provided to the Commonwealth.</p>
VG Shared Security Service	<p>The shared security service developed and implemented in the Virtual Gateway.</p>

Acronyms

Introduction

The following is a list of commonly used acronyms.

Acronyms

Acronym	Name
ANF	Executive Office of Administration and Finance
CHE	Chelsea Soldiers' Home
CIW	Commonwealth Information Warehouse
DMH	Department of Mental Health
DMR	Department of Mental Retardation
DPH	Department of Public Health
DSS	Department of Social Services
DTA	Department of Transitional Assistance
DYS	Department of Youth Services
EHS/EOHHS	Executive Office of Health and Human Services
ELD	Elder Affairs
HCF	Health Care Finance and Policy
HLY	Holyoke Soldiers' Home
ITD	Information Technical Division
Acronym	Name
MCB	Massachusetts Commission for the Blind
MCDHH	Massachusetts Commission for the Deaf and Hard of Hearing

MRC	Massachusetts Rehabilitation Commission
NewMMARS	New Massachusetts Management Accounting and Reporting System
PDM	Provider Data Management
POS	Purchase of Service
PPA	Principal Purchasing Agent
ORI	Office of Refugees and Immigrants
OSC	Office of State Comptroller
OSD	Operational Services Division
SAO	State Auditor's Office
SRR	Surplus Revenue Retention Summary
UFR	Uniform Financial Report
VET	Veterans' Affairs